



Departmental Quarterly Performance Report

Department Name: PROPERTY APPRAISAL

**Reporting Period:
Fiscal Year 2003 – 2004
1st Quarter**

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MAJOR PERFORMANCE INITIATIVES

Describe Key Initiatives and Status

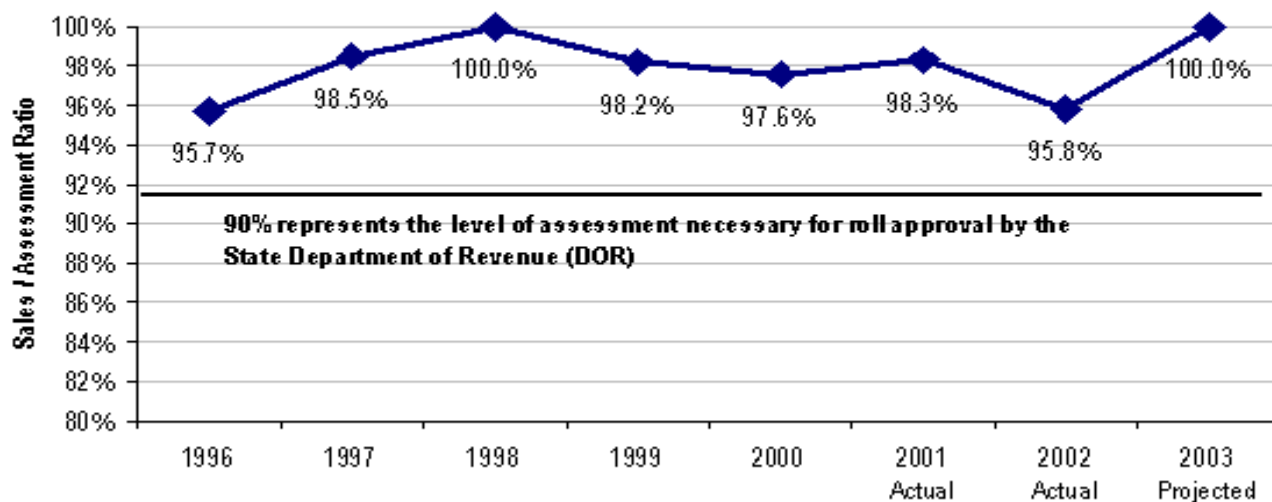
Check all that apply

Submission of certified tax roll by July 1 to the State of Florida Department of Revenue (DOR) for approval.

- Complete the Real Estate assessment work cycle by June 15 and ensure that the roll meets each of the Real Estate sales strata standards mandated by DOR.
- Complete the Personal Property Assessment work cycle by June 15.
- Complete the personal and institutional exemption intake and processing cycle by June 15.

☒ Strategic Plan
☒ Business Plan
☒ Budgeted Priorities
☐ Customer Service
☐ ECC Project
☐ Workforce Dev.
☐ Audit Response
☐ Other _____
 (Describe)

Roll Approval Standard



The level of assessment for 2003 roll will be updated in the 2nd quarterly report.

Enhance the Property Appraisal website to ensure quality customer service.

- Develop a Personal Property Website with similar functions as the Real Estate Website.
- Develop an on-line (e-Application) for the exemption process (see EMS initiative)
- **Both initiatives are awaiting implementation of the Computerized Assisted Mass Appraisal (CAMA) system.**

☒ Strategic Plan
☒ Business Plan
☒ Budgeted Priorities
☒ Customer Service
☒ ECC Project
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☐ Other _____
 (Describe)

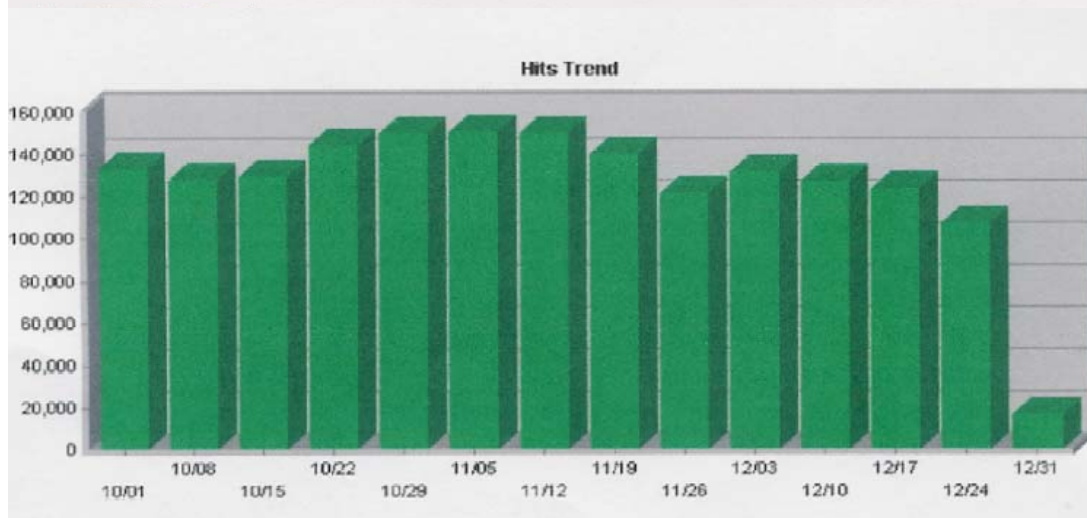
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Property Appraisal Department WEBTRENDS Report

www – PA (InterNet)	1 st Quarter Report	
Cumulative statistics	10/01/2003- 12/31/2003	
Hits	Entire Site (Successful)	1,750,874
	Average Per Day	19,031
	Home Page	N/A
Page Views	Page Views (Impressions)	1,652,341
	Average Per Day	17,960
	Document Views	N/A
Visitor Sessions	Visitor Sessions	651,475
	Average Per Day	7,081
	Average Visitor Session Length	0:07:33
	International Visitor Sessions	3.40%
	Visitor Sessions of Unknown Origin	3.81%
	Visitor Sessions from United States	79%
Visitors	Unique Visitors	282,163
	Visitors Who Visited Once	217,011
	Visitors Who Visited More Than Once	65,152



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<p>Computer Aided Mass Appraisal (CAMA) system to improve the Department's Real Estate daily business transactions and database processes. The Selection committee received approval of their vendor choice from the County Manager's Office.</p> <ul style="list-style-type: none"> <i>The Department and Vendor are in negotiation on the revised contract.</i> 	<p> <input checked="" type="checkbox"/> Strategic Plan <input checked="" type="checkbox"/> Business Plan <input checked="" type="checkbox"/> Budgeted Priorities <input type="checkbox"/> Customer Service <input type="checkbox"/> Workforce Dev. <input checked="" type="checkbox"/> ECC Project <input type="checkbox"/> Audit Response <input type="checkbox"/> Other _____ (Describe) </p>
<p>Electronic Document Management Services (EDMS) unit developed in the Information Services Division. The main function of the unit will be to ensure the timely exchange of Value Adjustment Board Hearing information according to the Florida Statutes. The secondary function will be to identify and apply the EDMS process to existing documentation within the Department.</p> <ul style="list-style-type: none"> <i>Development of web-based EDMS project productivity tracking application.</i> <i>Development of a schedule and prioritizing the documents to be scanned.</i> <i>Scanned the Exemption Applications for 2003 roll year, plan to scanned applications from year 1992 forward. Scanned Personal Property Returns and Field Sheets for 2003 roll.</i> 	<p> <input checked="" type="checkbox"/> Strategic Plan <input checked="" type="checkbox"/> Business Plan <input checked="" type="checkbox"/> Budgeted Priorities <input checked="" type="checkbox"/> Customer Service <input type="checkbox"/> Workforce Dev. <input checked="" type="checkbox"/> ECC Project <input type="checkbox"/> Audit Response <input type="checkbox"/> Other _____ (Describe) </p>
<p>Digital Camera project is a proposal to research, test and implement digital cameras as a replacement for the existing Polaroid Instant Cameras; ability to integrate with CAMA; and reduce the annual expenditure on film. The pilot study has been completed and deemed successful. The Department has purchased Cameras and assigned them to the staff to be used in the field for the 2004 assessment roll. <i>This project is now part of the field appraisal cycle.</i></p>	<p> <input checked="" type="checkbox"/> Strategic Plan <input type="checkbox"/> Business Plan <input checked="" type="checkbox"/> Budgeted Priorities <input type="checkbox"/> Customer Service <input checked="" type="checkbox"/> Workforce Dev. <input checked="" type="checkbox"/> ECC Project <input type="checkbox"/> Audit Response <input type="checkbox"/> Other _____ (Describe) </p>
<p>Implementation of the electronic transfer of key documentation from the Clerk of the Courts.</p> <p><i>The application came on line in August of 2003. Clerks in the PA Real Estate Division were trained and assigned to entry and verification of deeds. Presently working on the backlog incurred by implementation process.</i></p>	<p> <input checked="" type="checkbox"/> Strategic Plan <input checked="" type="checkbox"/> Business Plan <input checked="" type="checkbox"/> Budgeted Priorities <input type="checkbox"/> Customer Service <input type="checkbox"/> Workforce Dev. <input checked="" type="checkbox"/> ECC Project <input type="checkbox"/> Audit Response <input type="checkbox"/> Other _____ (Describe) </p>

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<p>Development of a consolidated Personal Property Cut-Out database to reduce the initial response "to taxpayers' request for correction" from the current 60 to 90 days to 45 to 60 days.</p> <ul style="list-style-type: none"> <i>The priority of implementing this initiative has been postponed, awaiting the implementation of CAMA, which may have this functionality.</i> 	<p> <input checked="" type="checkbox"/> Strategic Plan <input checked="" type="checkbox"/> Business Plan <input checked="" type="checkbox"/> Budgeted Priorities <input checked="" type="checkbox"/> Customer Service <input checked="" type="checkbox"/> ECC Project <input type="checkbox"/> Workforce Dev. <input type="checkbox"/> Audit Response <input type="checkbox"/> Other _____ (Describe) </p>
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PERSONNEL SUMMARY

A. Filled/Vacancy Report

NUMBER OF FULL-TIME POSITIONS*	Filled as of September 30 of Prior Year	Current Year Budget	Actual Number of Filled and Vacant positions at the end of each quarter							
			Quarter 1		Quarter 2		Quarter 3		Quarter 4	
			Filled	Vacant	Filled	Vacant	Filled	Vacant	Filled	Vacant
	239	257	240	17						

* [Public Safety Departments should report the sworn versus non-sworn personnel separately and Departments with significant part-time, temporary or seasonal help should report these separately.](#)

Notes:

B. Key Vacancies:

- Twelve Property Appraisal Clerks and one Real Estate Change Clerk needed for the processing of data for the tax roll.
- One Income Specialists; positions needed for the Alternate Level of Assessment study and defending assessment values at the Value Adjustment Board.
- One Real Estate Evaluator 2 authorized for the Homestead Exemption Investigation Unit.

C. Turnover Issues:

None at this time

D. Skill/Hiring Issues

Lack of qualified White Females applying for open positions.

E. Part-time, Temporary and Seasonal Personnel

(Including the number of temporaries long-term with the Department)

Used Temporary personnel in the Homestead Exemption Division to enable the Department to man the satellite locations required for the exemption application-filing period.

F. Other Issues

A skilled computer technician needed in the Information Services Division to assist in maintaining the over 200 personal computers and peripheral equipment we now have in the Department.

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FINANCIAL SUMMARY

(All Dollars in Thousands)

	PRIOR YEAR Actual	CURRENT FISCAL YEAR						
		Total Annual Budget	Quarter 1		Year-to-date			
			Budget	Actual	Budget	Actual	\$ Variance	% of Annual Budget
Revenues								
General Fund	17,800	16,145	4,036	4,041	16,145	4,041	5	25%
Reimbursement	-2,568							
Budget Adjustment ♦								
Total	15,232	16,145	4,036	4,041	16,145	4,041	5	25%
Expense*								
Personnel	13,188	14,606	3,652	3,981	14,606	3,981	329	27%
Operating	1,542	1,454	363	60	1,454	60	-303	4%
Capital	502	85	21	0	85	0	-21	0
Total	15,232	16,145	4,036	4,041	16,145	4,041	5	25%

* Expenditures may be reported by activity as contained in your budget or may be reported by category (personnel, operating and capital).

Equity in pooled cash (for proprietary funds only)

Fund/ Subfund	Prior Year	Projected at Year-end as of			
		Quarter 1	Quarter 2	Quarter 3	Quarter 4
Total					

Comments:

(Explain variances discuss significant in-kind services, provide status of aged receivables at 30-60-90-+ days and those scheduled for write-off, if applicable)

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STATEMENT OF PROJECTION AND OUTLOOK

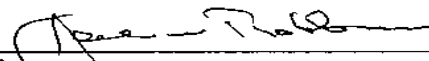
The Department projects to be within authorized budgeted expenditures and projects that available revenues will exceed expenses except as noted below:

Notes and Issues:

(Summarize any concern or exception, which will prohibit the Department from being within authorized budgeted expenditures and available revenues)

DEPARTMENT DIRECTOR REVIEW

The Department Director has reviewed this report in its entirety and agrees with all information presented including the statement of projection and outlook.



Signature

Joel W. Robbins, Department Director

Date 3/25/04